

HIGHER EDUCATION PROGRAMS INSTITUTIONAL SERVICE SYSTEM

GRANT ELIGIBILITY APPLICATION USER GUIDE



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GEA QUICK SHEET

This page provides a quick overview of the HEPIS Grant Eligibility Application system and how to use it. We recommend you review the entire User Guide to learn more about how each part of the system works so you can fully understand the Title III/Title V grant eligibility application process.

1. **Log in to <https://hepis.ed.gov> with your username and password**

See **Sections II & III** of this user guide for more details about logging into the system

2. **Check to see if your institution has been determined eligible for a Title III or Title V grant based on 2018 data extracted from NCES and if so, print your *eligibility letter***

See **Section V** and **Section VIII** of this user guide for more about checking your eligibility status and printing your eligibility letter

3. **If your institution is not determined to be eligible based on NCES data, you may choose to provide additional information by completing an *Eligibility Application***

See **Section IX** of this user guide for more information about the Application

4. **If your institution is not determined to be eligible based on your Application, you may choose to submit an *Exemption Request*, which will be reviewed by Department staff and will be granted or denied based on their determination**

See **Section X** of this user guide for more information about Exemption Requests

For complete details about this entire process, please read this **User Guide** and the **Application, Instructions and blank ED Form 1049**, both of which are available at <https://hepis.ed.gov/help>.

I. About the Grant Eligibility Application System

The Grant Eligibility Application (GEA) system is used to determine if an institution is eligible to apply for a new Title III or Title V grant in the next fiscal year.

Institutions are eligible to apply for grants if they meet specific statutory and regulatory eligibility requirements. An institution of higher education (IHE) that is designated as an eligible institution may also receive a waiver of certain non-Federal cost-sharing requirements for one year. If an institution is eligible, they may download their eligibility letter from the system.

An institution is determined to be eligible one of three ways: via Pre-eligibility based on NCES data, Application, or Exemption Request.

Pre-eligibility. The GEA system is populated with a data extract from the National Center of Education Statistics (NCES). An institution is determined to be *pre-eligible* if their Pell Grant recipients are EQUAL TO OR ABOVE the current year's threshold and their Core Expenses are EQUAL TO OR BELOW the current year's threshold. Due to reporting timeline constraints the most recent data extract is always two years old, so if an institution is not deemed eligible via the data extract, there are alternatives.

Application. If an institution does not meet the pre-eligibility requirements, they may choose to complete an application. The *Application* provides an institution with the opportunity to provide additional and/or updated information that may cause their numbers to meet threshold requirements, and therefore be determined eligible.

Exemption Request. If an institution's application does not meet the eligibility requirements, they may choose to submit an exemption request. The *Exemption Request* provides an institution with the opportunity to provide further details and/or information that may explain why they do not meet threshold requirements, and justify why they should be granted eligibility despite the numbers they submitted. Exemption requests are reviewed by Department staff and will be granted or denied based on their determination.

The GEA system generally opens in the late fall or early winter and remains open for approximately 60 days.

For more information please see: <https://www2.ed.gov/about/offices/list/ope/itudes/eligibility.html>

II. HEPIS Home Page

After accepting a standard disclaimer regarding usage of a Federal website, you will be able to access the HEPIS system home page.

The screenshot shows the HEPIS Home Page. At the top is a dark blue header with the text "HEP IS" in large white letters, followed by "Higher Education Programs: Institutional Service" in smaller white letters. Below this is a navigation bar with links: "HEP IS Home", "About", "Help", "FAQs", and "Contact Us". A red circle with the number 1 is next to the "HEP IS Home" link.

Below the navigation bar is a white section with the heading "Welcome to the new HEP IS web portal!". Below this heading is a paragraph of text: "Institutional Service (IS) administers programs authorized under Title III and Title V of the Higher Education Act of 1965, as amended. For more information, see the About section." A red circle with the number 2 is next to this paragraph.

Below the paragraph are two lines of text: "The Grant Eligibility Application system will be open from 12/16/2019 through 1/31/2020." and "The Titles III and V Annual Performance Reporting system will be open from 1/6/2020 through 3/6/2020." A red circle with the number 2 is next to the first line.

Below the text are two main sections. On the left is a light blue box with the heading "New to HEP IS?" and the text "Click the button below to get started". Below this text is a dark blue button with the text "New User". A red circle with the number 3 is next to this button.

Below the "New User" button is another light blue box with the heading "Find blank forms and guides" and the text "Click here to view blank report forms and user guides for HEP IS systems." A red circle with the number 4 is next to this text.

On the right is a white box with the heading "Returning User? Login Below." Below this heading are two input fields: "Email:" and "Password:". A red circle with the number 5 is next to the "Email:" field. Below the "Password:" field is a dark blue button with the text "Login". To the left of the "Login" button are two links: "Forgot your password?" and "Need Help?".

At the bottom of the page is a dark blue footer with the text "About HEP IS" on the left, the Department of Education seal in the center, and "Contact Us" on the right.

1. Main Menu Links:

- HEPIS Home** - return to the home page
- About** - learn more about the HEPIS website and each of its subsystems.
- Help** - access User Guides, blank forms, and other helpful resources
- FAQs** - review answers to frequently asked questions
- Contact Us** - fill out a contact form to request assistance from the Help Desk (staffed Mon-Fri, 9 am-5 pm Eastern time; telephone support is not available)

2. System Information - look here for important information about when various HEPIS subsystems are opening and closing.

3. New User - click here if you need to request a new user account

4. Blank forms and guides - another link the the *Help* page described above

5. Login fields:

- a. **Email** - in this system your username is your email address
- b. **Password** - remember not to share your password with anyone; additional users require their own accounts linked to their own email addresses
- c. **Forgot your password** - to request a link via email to reset your password
- d. **Need help** - another link to the *Contact Us* page described above
- e. **Login** - after entering your username and password, click this button to login

A. New User Accounts

If you need a new user account, click the **New User** button and enter your email address into the field provided. The system will check to see if your email is already registered.

If your email address is not in the system, you'll be presented with a form to request a new user account. Make sure you provide the new user's:

- First Name
- Last Name
- Email Address,
- Institution Name, and
- Institution OPEID

The Help Desk must verify that the new user is authorized to access the application by contacting an individual that is currently in the system from a previous year.

Please allow up to one business day for new accounts to be created.

To save a step and expedite this process, you may choose to have someone who completed the Eligibility Application in a previous year fill out the new account request form rather than the new user.

III. Two-Factor Authentication

All Federal websites are now required to include **TWO-FACTOR AUTHENTICATION** in the login process. You may have seen this on other websites, especially those for banks and credit card companies.

Two-factor authentication requires that you login first with something you *know* (i.e., your username and password), and then with something you *have* (e.g., your phone).

You'll have the option to authenticate to the HEPIS website by means of:

- a smartphone app,
- a text message, or
- a voice telephone call.

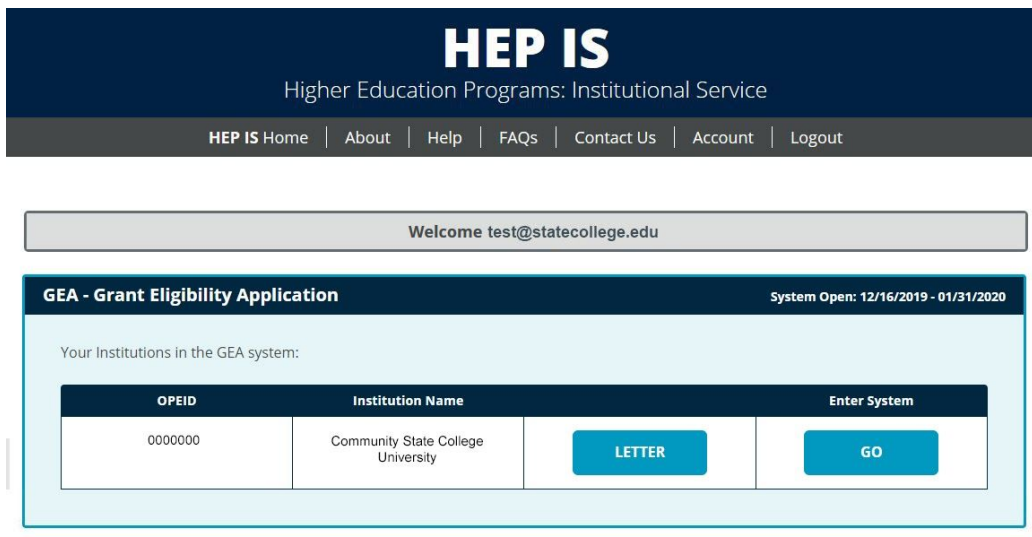
You'll authenticate by confirming a request in the app, or by entering a 6-digit code onto the website sent to you by text or by voice.

The smartphone app is the recommended option, but we realize not everyone will have the access or the desire to use an app.

No matter which method you choose, the website will walk you through the setup process step by step. Setting it up will take less than five minutes, and using it each time you login will take only a few seconds.

IV. HEPIS Landing Page

After you successfully log into the system, you will be on the HEPIS Landing Page.



The screenshot shows the HEPIS (Higher Education Programs: Institutional Service) landing page. At the top is a dark blue header with the text "HEP IS" in large white letters, followed by "Higher Education Programs: Institutional Service" in smaller white text. Below this is a navigation bar with links: "HEP IS Home", "About", "Help", "FAQs", "Contact Us", "Account", and "Logout". A light gray banner below the navigation bar says "Welcome test@statecollege.edu". The main content area has a dark blue header with "GEA - Grant Eligibility Application" on the left and "System Open: 12/16/2019 - 01/31/2020" on the right. Below this, it says "Your Institutions in the GEA system:". A table follows with three columns: "OPEID", "Institution Name", and "Enter System". The table contains one row with the OPEID "0000000", the Institution Name "Community State College University", and two buttons: "LETTER" and "GO".

OPEID	Institution Name	Enter System
0000000	Community State College University	<input type="button" value="LETTER"/> <input type="button" value="GO"/>

Your landing page may look different from the one displayed above. It will show you the Institution and Grants (if applicable) that your account has the rights to access.

The main menu has two additional links now that you're logged in:

1. **Account** - click here to change your password and manage your two-factor authentication method(s)
2. **Logout** - click here to end your user session and logout of the system

To download your eligibility letter, click the **LETTER** button. If that button is inactive or greyed out, it means your institution is currently not deemed to be eligible. If the system is still open, you should enter the system and submit an Application and/or an Exemption Request, as needed.

To enter the Grant Eligibility Application system, click the **GO** button.

V. GEA Home Page

The GEA home page will show you your eligibility at a glance. As you can see below, there is a red “X” in the Status column of the Pre-eligibility row. This means that our test institution is not eligible based on their data imported from NCES.

The screenshot shows the GEA Home page. The sidebar on the left contains a user profile icon, a 'GEA Home' link, and four numbered red circles corresponding to the main content area: 4 for Application, 2 for Eligibility Letter, 1 for Institution Details, and a back arrow for HEP. The main content area has a blue header with the GEA logo and navigation links. Below the header, a welcome message for 'test@statecollege.edu' is displayed. A dark blue banner with a red circle '1' prompts the user to 'Verify/Update Institution Details'. The 'Your Eligibility Determination for FY 2018' table shows three rows: Pre-eligibility (Status: Not Eligible, marked with a red X), Application (Status: Needed), and Exemption (Status: N/A). The Pre-eligibility row has buttons for 'View Letter' (2) and 'View Data' (3). The Application row has a 'Begin Application' button (4).

Type	Status	What it means	Details
Pre-eligibility	Not Eligible 	An application needs to be submitted in order to be considered for eligibility. Based on the information in the Integrated Postsecondary Education Data System (IPEDS), has been designated as an ineligible institution for FY 2018 under Title III and Title V programs of the Higher Education Act of 1965, as amended by the Higher Education Opportunity Act of 2008 (HEOA). However, if you feel this decision is incorrect and that your institution does qualify as eligible, you have the option of filling out an online application. Once submitted, this application will instantly determine your institution's eligibility based on your updated numbers.	View Letter (2) View Data (3)
Application	Needed	Based on your data, you are ineligible, but able to fill out an application to apply for eligibility.	Begin Application (4)
Exemption	N/A	You do not need to submit an exemption	N/A

From the GEA home page you can perform the following tasks:

1. **Verify/Update Institution Details** - every year the first thing you should do is review your Institution details and make any updates necessary (see Section VI)
2. **View Letter** - view and download your eligibility letter (see Section VIII)
3. **View Data** - view your eligibility data as determined from NCES (see Section VII)
4. **Begin Application** - if not determined to be pre-eligible, begin your eligibility application (see Section IX)

Note: the **Begin Exemption Request** button in the last row of the table will be available only if and when a user needs it (see Section X, if applicable).

VI. Institution Details

Each year you should verify and update your Institution details.

GEA
Grant Eligibility Application

[About](#) | [Help](#) | [FAQs](#) | [Contact Us](#) | [Account](#) | [Logout](#)

GEA Home / [Institution Details](#)

Institution Details

Update your institution and contact information below.

Welcome test@statecollege.edu

Community State College University
OPEID: 00000000

Primary Information

Address 1: Address 2:

City: State: Zip:

DUNS: Religious: Type: Control:

Contact Person

First Name: MI: Last Name:

Title:

Email: Phone: Ext:

Data Entry Person

First Name: Last Name:

Email: Phone: Ext:

[Cancel](#) [Save](#)

The sample above is blank, but your Institution's details will be pre-populated for you. Please verify that all information is correct, including the names and contact information for the primary Contact Person (required) and an Additional Data Entry Person (optional).

Click **Save** when done making updates.

VII. NCES Eligibility Data

Click the **View Data** button on the GEA Home Page, or click the Eligibility Letter option on the left menu then the Eligibility Information tab to see the data that was extracted from NCES to determine your eligibility status.

REMEMBER: DUE TO REPORTING TIMELINES THE DATA EXTRACTED FROM NCES IS TWO YEARS OLD. Therefore your eligibility for FY 2020, for example, is determined based on your Institution's data from FY 2018 (i.e., school year 2017-18).

The screenshot shows the GEA (Grant Eligibility Application) interface. The top navigation bar includes links for About, Help, FAQs, Contact Us, Account, and Logout. The left sidebar contains links for GEA Home, Application, Exemption, Eligibility Letter, and Institution Details. The main content area displays the Eligibility Letter, which includes a welcome message for test@statecollege.edu and the institution name, Community State College University. Below this, the Eligibility Information tab is active, showing a table titled 'Your Eligibility Calculation for FY 2018'. The table compares the institution's performance against eligibility thresholds. Red callouts 1, 2, 3, and 4 highlight specific elements: 1 points to the Pell Grant Recipient Percent, 2 points to the Core Expenses per Full-time Equivalent, 3 points to the Eligibility Threshold, and 4 points to the Your Eligibility Calculation. The table indicates that the institution is not eligible for the FY 2018 calculation.

	Eligibility Threshold	Your Eligibility Calculation
Pell Grant Recipient Percent of Half-time to Full-time Undergrads	38%	24% Should be \geq eligibility threshold
Core Expenses per Full-time Equivalent	\$30,044	\$24,187 Should be \leq eligibility threshold

Eligible: No
Begin Application

There are two important points of data on this screen:

1. Pell Grant recipient percentage, and
2. Core Expenses per FTE.

Each of these values has a *Threshold* (3) that must be met in order for your Institution to be determined eligible. The threshold varies from year to year, and on school type (2yr/4yr) and control (public/private).

Your Eligibility Calculation (4) shows your Institution's data for the FY noted in the table header (current fiscal year minus two years, again, due to NCES reporting timelines). As seen above, Pell Grant percentage should be **greater** than or equal to the threshold, and Core Expenses should be **less** than or equal to the threshold. This text will display in **green** if your Institution passes the test, or in **red** if it doesn't.

If your institution passes *both* of these tests, then it is determined to be **eligible** based on NCES data. This means you're done! You may now download your Eligibility Letter (see Section VIII).

If your institution fails *either one* or *both* of these tests, it is determined to be **ineligible** based on NCES data. You now have the option of filling out an Application where you can provide additional data that may change your eligibility status.

Click the **Begin Application** button to proceed (see Section IX).

VIII. Eligibility Letter

Click the **View Letter** button on the GEA Home Page, or click the Eligibility Letter option on the left menu then the Eligibility Letter tab to view and download your eligibility letter.

Your eligibility letter will list the programs your Institution is eligible to apply for, and can also be used to show eligibility for a waiver of the non-Federal share matching requirements.

The screenshot displays the GEA (Grant Eligibility Application) web interface. At the top, a blue header contains the GEA logo and the text "Grant Eligibility Application". Below this is a dark blue navigation bar with links: About, Help, FAQs, Contact Us, Account, and Logout. On the left, a vertical menu shows options: GEA Home, Application, Exemption, and Eligibility Letter (which is highlighted). The main content area shows the "Eligibility Letter" page. It includes a breadcrumb trail "GEA Home / Eligibility Letter" and a sub-header "Eligibility Letter" with a note: "Click between the tabs to see your eligibility determination and view/download/print your eligibility letter." Below this is a light blue box with the text: "Welcome test@statecollege.edu", "Community State College University", and "OPEID: 00000000". The page is divided into two tabs: "Eligibility Letter" (active) and "Eligibility Information". Under the "Eligibility Letter" tab, there are two buttons: "Download your 2018 Eligibility Letter" and "Print your 2018 Eligibility Letter". Below these buttons is a large white box containing a sample eligibility letter. The letter features the U.S. Department of Education logo and text: "U.S. Department of Education", "Office of Post Secondary Education", "Community State College University", "City, State, Zip", "OPEID: 00000000", and "Print Date: 2019-12-06". The body of the letter states: "I regret to inform you that we were not able to designate your institution as an 'eligible institution' under Titles III and V of the Higher Education Act of 1965 as amended by the Higher Education Opportunity Act of 2008 (HEA). The reason for this decision is" followed by a placeholder "(Explanation will display here...)". At the bottom, it provides contact information: "If you have questions concerning this designation please contact Christopher Smith at Christopher.Smith@ed.gov or (202) 453-7946 or Jason Cottrell Ph.D. at Jason.Cottrell@ed.gov or (202) 453-7530."

If you've submitted an Application and an Exemption Request and you're ultimately deemed ineligible, as our sample Institution is here, your letter will include the determination by Department staff in the space indicated in the image above.

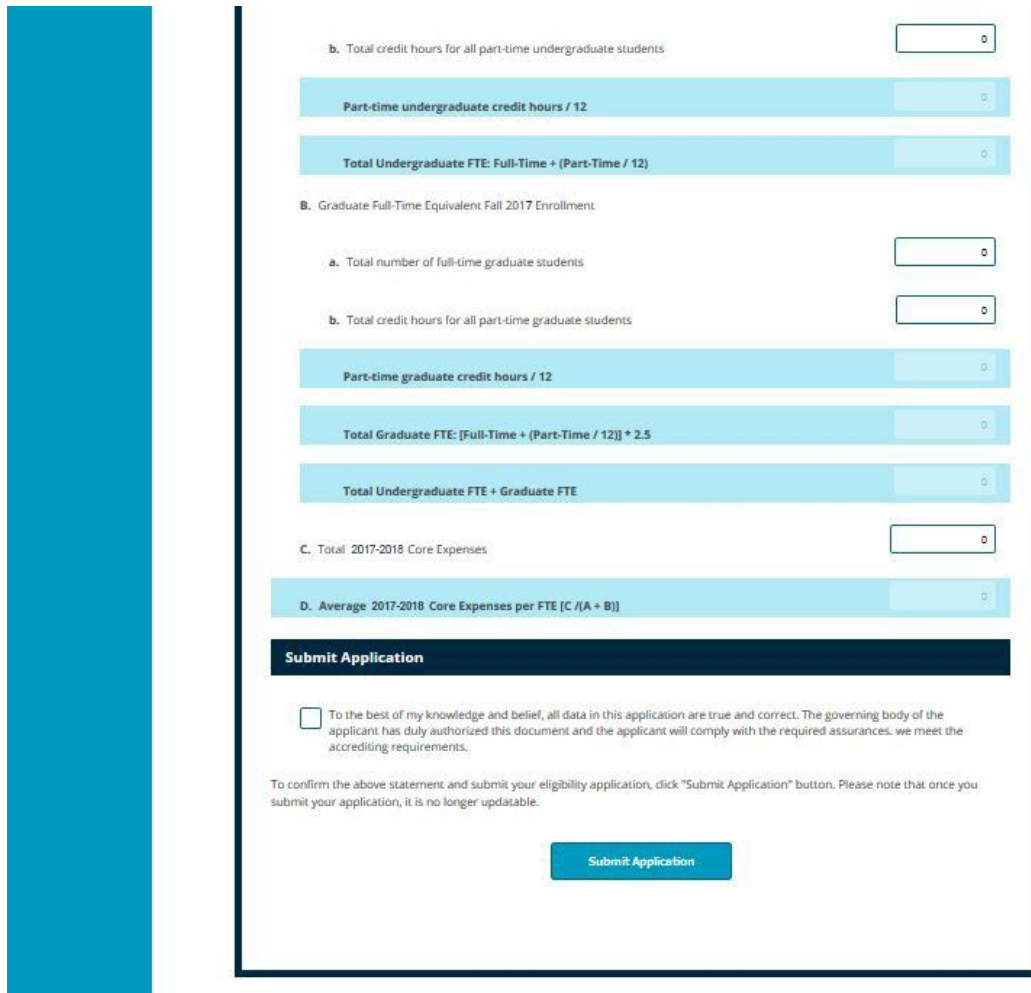
IX. Application

The Application provides an institution with the opportunity to provide additional and/or updated information that may cause their numbers to meet threshold requirements, and therefore be determined eligible.

All fields on the Application are required.

The screenshot displays the GEA Grant Eligibility Application web interface. The header features the GEA logo and navigation links: About, Help, FAQs, Contact Us, Account, and Logout. A left sidebar contains a user profile icon, a 'GEA Home' link, and a menu with 'Application' (highlighted), 'Exemption', 'Eligibility Letter', and 'Inclusion Details'. Below the menu is a blue button with a left arrow and the text 'HEP'. The main content area shows the breadcrumb 'GEA Home / Application' and the title 'Application for FY 2020' with a sub-instruction: 'Enter your information in the fields below to see your determined eligibility.' A light blue box contains the user information: 'Welcome test@statecollege.edu', 'Community State College University', and 'OPEID: 00000000'. Below this is a tabbed interface with '1. Application' (active) and '2. Eligibility Determination'. Under 'Step 1: Application', there are two sections: 'Institutional Enrollment (Fall 2017 Headcount)' and 'Institutional Statistics (Fall 2017)'. The first section has two rows: '1. Total Institutional Enrollment' and '2. Total Minority Enrollment', each with a text input field containing '0'. The second section has two sub-sections. The first, '1. Needy Student Requirement', includes four rows: 'A. Enrollment of Undergraduate and Graduate Degree Students', 'B. Recipients of Title IV Need-Based Financial Assistance' (with a note: '(Include only Pell Grant, Supplemental Educational Opportunity Grant, College Work Study, and Perkins Loan)'), 'C. Enrollment of Half-Time up to and including Full-Time Undergraduate Degree Students', and 'D. Pell Grant Recipients', each with a text input field containing '0'. The second sub-section, '2. Core Expenses (formerly known as Educational & General Expenditures) Requirement', includes two rows: 'A. Undergraduate Full-Time Equivalent Fall 2017 Enrollment', which has two sub-rows 'a. Total number of full-time undergraduate students' and 'b. Total credit hours for all part-time undergraduate students', each with a text input field containing '0'.

(continued on next page...)



The screenshot displays a web-based application form with the following sections and fields:

- Undergraduate Section:**
 - Field: b. Total credit hours for all part-time undergraduate students (input: 0)
 - Calculation: Part-time undergraduate credit hours / 12 (input: 0)
 - Calculation: Total Undergraduate FTE: Full-Time + (Part-Time / 12) (input: 0)
- Graduate Section (B):**
 - Field: a. Total number of full-time graduate students (input: 0)
 - Field: b. Total credit hours for all part-time graduate students (input: 0)
 - Calculation: Part-time graduate credit hours / 12 (input: 0)
 - Calculation: Total Graduate FTE: [Full-Time + (Part-Time / 12)] * 2.5 (input: 0)
 - Calculation: Total Undergraduate FTE + Graduate FTE (input: 0)
- Expenses Section (C):**
 - Field: C. Total 2017-2018 Core Expenses (input: 0)
 - Calculation: D. Average 2017-2018 Core Expenses per FTE [C / (A + B)] (input: 0)
- Submission Section:**
 - Section Header: Submit Application
 - Checkbox: ☐ To the best of my knowledge and belief, all data in this application are true and correct. The governing body of the applicant has duly authorized this document and the applicant will comply with the required assurances. We meet the accrediting requirements.
 - Text: To confirm the above statement and submit your eligibility application, click "Submit Application" button. Please note that once you submit your application, it is no longer updatable.
 - Button: Submit Application

To submit your application, complete all fields and check the box near the bottom confirming that all data in this application are true and correct to the best of your knowledge. Then click the **Submit Application** button.

If the data you supply changes your Pell Grant percentage or your Core Expenses and satisfies the threshold requirement, you will be informed immediately. This means you're done! You may now download your Eligibility Letter (see Section VIII).

If not, you will have the option to fill out and submit an Exemption Request (see Section X).

For more information about the Application and the data requested on it, please see the "Application, Instructions and blank ED Form 1049 in PDF format" link on the Help page.

X. Exemption Request

The Exemption Request provides an institution with the opportunity to provide further details and/or information that may explain why they do not meet threshold requirements, and justify why they should be granted eligibility despite the numbers submitted.

Exemption requests are reviewed by Department staff and will be granted or denied based on their determination.

The screenshot displays the GEA (Grant Eligibility Application) web interface. The top navigation bar includes links for About, Help, FAQs, Contact Us, Account, and Logout. The left sidebar contains links for GEA Home, Application, Exemption, Eligibility Letter, Institution Details, and a back arrow labeled HEP. The main content area is titled "Exemption" and provides instructions: "Prepare a separate narrative for each exemption option you select below that provides the required evidence for that option, and demonstrates that the exemption(s) applies to your particular institution." It also states: "The narrative must contain compelling evidence. Mere statements of fact may not be enough to support your request. You may also upload supporting documents for each option." and "You must respond to all components of the exemption option and provide supporting documentation (relevant studies, recent reports and/or data, etc.) to justify your request for an exemption." A checkbox is present with the text "Check here to confirm that you have read and understand the statements above." Below this is a welcome message for "test@statecollege.edu" from "Community State College University" with OPEID: 00000000. The main content area is divided into three tabs: "1. Needy Student Requirement", "2. Core Expenses", and "Review and Submit". The "1. Needy Student Requirement" tab is active, showing "Step 1: Needy Student Requirement". Under "Section 1", it instructs to "Select each box that applies and upload your supporting documents." There are three options: A (marked with a red X), B (marked with a red X), and C (marked with a green checkmark). Option C is "Requesting a exemption of the needy student requirement (Section 607.3(b) and Section 603.3(b) option(s)):". Below option C are two sub-options: 1. "The State provides more than 30 percent of the institution's budget and the institution charges not more than \$99.00 for tuition and fees for an academic year" (checkbox unchecked) and 2. "At least 30 percent of the students served by the institution in the base year were students from low-income families" (checkbox unchecked).

GEA
Grant Eligibility Application

About | Help | FAQs | Contact Us | Account | Logout

GEA Home
Application
Exemption
Eligibility Letter
Institution Details
← HEP

Exemption

Prepare a separate narrative for each exemption option you select below that provides the required evidence for that option, and demonstrates that the exemption(s) applies to your particular institution.

The narrative must contain compelling evidence. Mere statements of fact may not be enough to support your request. You may also upload supporting documents for each option.

You must respond to all components of the exemption option and provide supporting documentation (relevant studies, recent reports and/or data, etc.) to justify your request for an exemption.

☐ Check here to confirm that you have read and understand the statements above.

Welcome test@statecollege.edu
Community State College University
OPEID: 00000000

1. Needy Student Requirement | 2. Core Expenses | Review and Submit

Step 1: Needy Student Requirement

Section 1

Select each box that applies and upload your supporting documents.

☒ A. At least 50% of degree students are recipients of need-based Title IV financial support.

☒ B. Enrollment exceeds the threshold for percentage of student receiving Pell grants for the fall 2017-2018 academic term.

☒ C. Requesting a exemption of the needy student requirement (Section 607.3(b) and Section 603.3(b) option(s)):

☐ 1. The State provides more than 30 percent of the institution's budget and the institution charges not more than \$99.00 for tuition and fees for an academic year

☐ 2. At least 30 percent of the students served by the institution in the base year were students from low-income families

(continued on next page...)

☐ 3. The institution substantially increases the higher education opportunities for low-income students who are also educationally disadvantaged, underrepresented in postsecondary education, or minority students

☐ 4. The institution substantially increases the higher education opportunities for individuals who reside in an area that is not included in a "metropolitan statistical area" as defined by the Office of Management and Budget and who are unserved by other postsecondary institutions

☐ 5. The institution is located on or within 50 miles of an Indian reservation, or a substantial population of Indians and the institution will, if granted the exemption, substantially increase higher education opportunities for American Indians

☐ 6. The institution will, if granted the exemption, substantially increase the higher education opportunities for Black or African Americans, Hispanic Americans, Native Americans, Asian Americans or Pacific Islanders, including Native Hawaiians.

[Save & Continue to Core Expenses](#)

It's very important that you read the instructions at the top of this page. You will not be able to submit your form unless you've checked the box indicating that you've read and understand the instructions.

As you can see above, the sample Institution failed the Needy Student requirement both in their NCES data and in their Application. Now they are requesting an Exemption for this requirement, which is represented by the green check mark at the top of the form.

There are six options which an Institution could choose as the basis for their Needy Student exemption request. To read them in full, please refer to the **Application, Instructions and blank ED Form 1049** found on the Help page.

You must select at least one option, but you may select more than one if appropriate. Click the check box next to the option or options you wish to respond to.

Whichever option(s) you select, you must answer each question that will appear when you click the appropriate check box. As noted in the instructions at the top of the form, you must also provide supporting documentation (relevant studies, recent reports, and/or data, etc.) to justify your exemption request.

Our sample Institution satisfied the Core Expenses requirement, therefore does not need to submit an exemption request for this category.

The screenshot displays the GEA (Grant Eligibility Application) web interface. The header features the GEA logo and navigation links: About, Help, FAQs, Contact Us, Account, and Logout. A left sidebar contains links for GEA Home, Application, Exemption, Eligibility Letter, and Institution Details, with the Exemption link highlighted. The main content area is titled 'Exemption' and includes instructions: 'Prepare a separate narrative for each exemption option you select below that provides the required evidence for that option, and demonstrates that the exemption(s) applies to your particular institution. The narrative must contain compelling evidence. Mere statements of fact may not be enough to support your request. You may also upload supporting documents for each option. You must respond to all components of the exemption option and provide supporting documentation (relevant studies, recent reports and/or data, etc.) to justify your request for an exemption.' Below this is a checkbox labeled 'Check here to confirm that you have read and understand the statements above.' A light blue box displays the user's welcome message: 'Welcome test@statecollege.edu', the institution name 'Community State College University', and the OPEID '00000000'. A progress bar at the bottom shows three steps: '1. Needy Student Requirement', '2. Core Expenses' (which is the active step), and 'Review and Submit'. The 'Step 2: Core Expenses' section contains the message 'Your institution already satisfies this threshold. Continue to the next page.' and a 'Continue to Review and Submit' button.

Based on your scenario, you may be asked to provide an exemption request for one, the other, or both categories. If you do not have to submit a request, the system will not prompt you for the information.

On the Review and Submit page you will have the opportunity to review and edit your responses, if necessary, as seen in the following excerpt from the page. Just click the **Edit** button (1) in the appropriate field if you need to edit your response (see below).

HEP

1. Needy Student Requirement

2. Core Expenses

Review and Submit

Review and Submit

Needy Student Requirement

Select each box that applies and upload your supporting documents.

✗

A. At least 50% of degree students are recipients of need-based Title IV financial support.

✗

B. Enrollment exceeds the threshold for percentage of student receiving Pell grants for the fall 2017-2018 academic term.

✓

C. Requesting a exemption of the needy student requirement (Section 607.3(b) and Section 603.3(b) option(s)):

✓

1. The State provides more than 30 percent of the institution's budget and the institution charges not more than \$99.00 for tuition and fees for an academic year

Provide evidence that the state provided more than 30 percent of your institution's budget for the base year.

Provide evidence that your institution charged not more than \$99.00 per student for tuition and fees for the base year.

1. Identify the resources provided by the state, citing specific dollar amounts.

Response here...

1

2. Show actual tuition and fees charged per student.

Response here...

3. Enter the 2017-2018 posted tuition and fees.

Response here...

Submit your Exemption Request when you are satisfied with your responses.

Your eligibility letter will be ready for download after Department staff has had a chance to review and evaluate your request. Your letter will include a synopsis of their evaluation.